

Rising tides: the surge and thirst for the GLP-1s

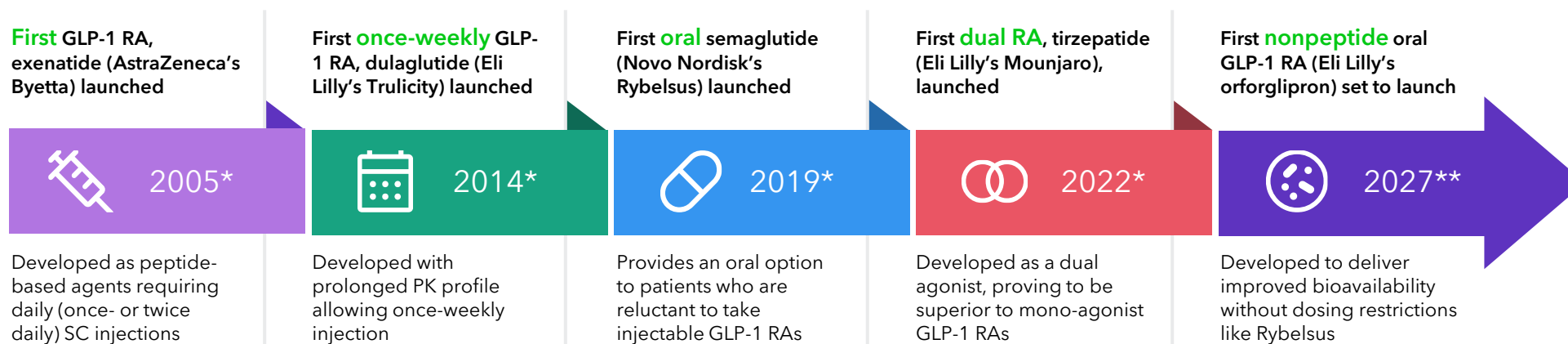
Market Trend Summary

Shambhavi Shukla | May 2024

GLP-1 receptor agonist products - a snapshot

The ongoing journey to market dominance

Evolution of GLP-1 receptor agonist (GLP-1 RA) products

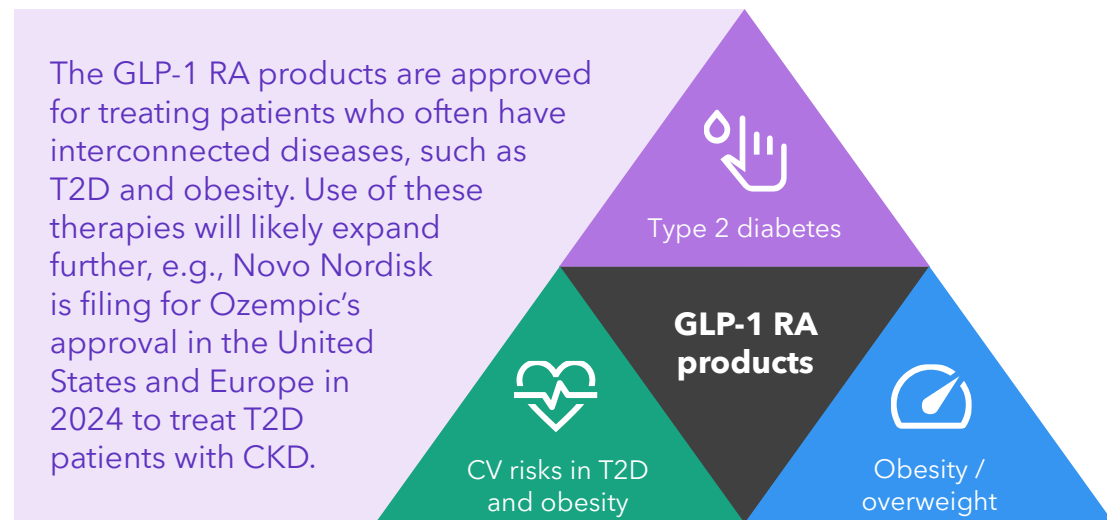


The GLP-1 RA product space is buzzing with sales growth and development activity. Established drugs such as Novo Nordisk's SC semaglutide (Ozempic / Wegovy) and Eli Lilly's SC tirzepatide (Mounjaro / Zepbound) are dominating the market, while ongoing research is focused on developing novel mechanisms combined with GLP-1 RAs, such as Amgen's MariTide and Eli Lilly's retatrutide, aimed at improving efficacy, reducing side effects, and easing administration.

GLP-1 RA products are not typically used as a first-line therapy and are usually reserved for severe disease stages. However, their impressive efficacy in reducing HbA1c levels, body weight, and cardiovascular risks is driving strong increases in drug sales and patient share. The demand for these therapies is high.

The surging popularity for GLP-1 RA products

Unprecedented demand from obesity and type 2 diabetes patients



Company	Molecule (formulation)	Brands in the United States	
		T2D	Obesity / overweight
Novo Nordisk	Semaglutide (SC)	Ozempic (0.5, 1, 2 mg)	Wegovy (2.4 mg)
	Semaglutide (oral)	Rybelsus (7, 14 mg)	–
	Liraglutide (SC)	Victoza (1.2, 1.8 mg)	Saxenda (3 mg)
Eli Lilly	Tirzepatide (SC)	Mounjaro (2.5, 5, 7.5, 10, 12.5, 15 mg)	Zepbound (2.5, 5, 7.5, 10, 12.5, 15 mg)

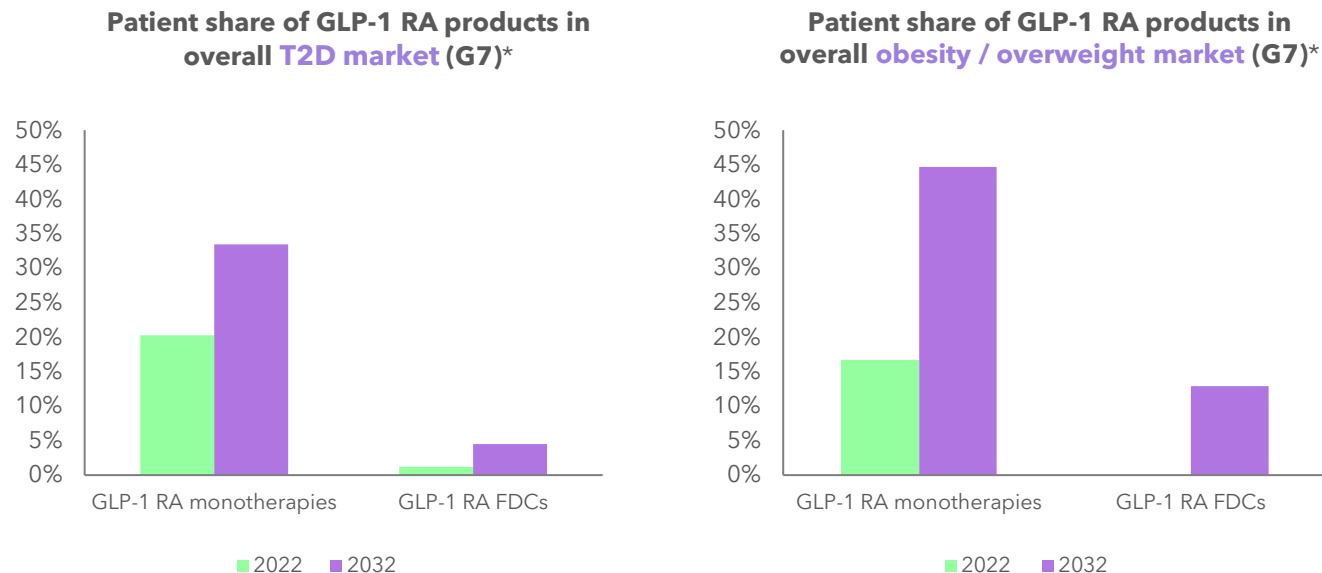
The soaring demand

Novo Nordisk's SC semaglutide and Eli Lilly's tirzepatide, launched for T2D in February 2018 and June 2022, respectively, have garnered substantial market traction owing to their impressive clinical profiles. While the obesity brands of these two therapies were later approved, the respective T2D brands are being used off-label for weight loss.

- We are observing a soaring demand for GLP-1 RA products among obesity / overweight patients in the G7 markets. In the United States, these drugs encounter high rejections due to insurance coverage issues; however, patients appear willing to bear high out-of-pocket costs for effective weight-loss therapies such as SC semaglutide and tirzepatide.
- This high use has caused a significant supply shortage of the SC semaglutide and tirzepatide T2D brands, leading to access problems for diabetic patients who need these medications to manage their health (particularly HbA1c levels).

Strong uptake across the G7

Significant adoption and rising popularity



* The patient share graphs are based on **Clarivate's 2022 BY forecast model** for respective markets. The 2023 BY forecast for T2D and obesity / overweight is due to be published in December 2024 and November 2024, respectively.

"The GLP-1 RAs are very important. They not only have cardiovascular benefits but also offer weight-loss effect. Increased weight is a pathophysiological aspect, and it is very important for diabetic patients to reduce weight. The GLP-1 RAs have changed diabetic treatment."—**Endocrinologist, Spain**

"I would ignore the gastrointestinal side effects associated with tirzepatide, considering its efficacy. Usually, patients get over any nausea or diarrhea they might have, as it is a short-term thing associated with almost all the GLP-1 RA products."—**Endocrinologist, United States**

Clarivate's takeaways

What impact will the increased use of GLP-1 RA products have on other antidiabetic drugs?

As the preference for GLP-RA products grows, the use of metformin and DPP-IV inhibitors (commonly prescribed T2D treatments) will experience some decline over the next 10 years. While insulin therapy becomes necessary as T2D progresses, the use of GLP-1 RA products delays this need. Additionally, patients on a GLP-1 RA product alongside insulin may require lower insulin doses compared with those on insulin alone.

What impact will the GLP-1 RA products have on the obesity market?

GLP-1 RA products are poised to revolutionize the obesity treatment landscape. Traditional antiobesity drugs, such as noradrenergic anorectics and lipase inhibitors, provide modest efficacy with safety concerns, and the need for better treatments is strong. GLP-1 RA products offer significant weight loss in addition to cardiovascular and renal benefits. As such, not only will existing patients switch from older treatments to GLP-1 RA products but also a significant influx of new patients will seek treatment with a GLP-1 RA product.

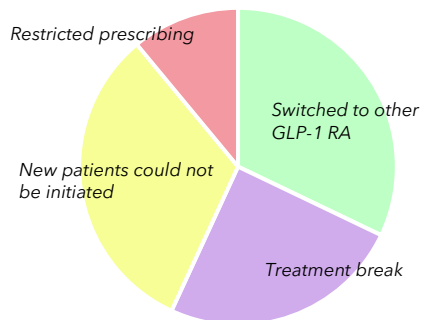
Squeezed supply of GLP-1 RA products

Type 2 diabetes patients left in limbo

In a survey conducted by Clarivate, the U.S. physicians acknowledged the impact of the shortage of SC semaglutide and tirzepatide T2D brands, and shared how they managed their commercially insured T2D patients during this period.

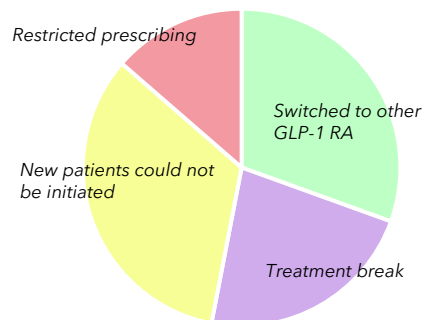
Impact of Ozempic (semaglutide) shortage on physician prescribing for T2D*

% Respondents (n = 63)



Impact of Mounjaro (tirzepatide) shortage on physician prescribing for T2D*

% Respondents (n = 52)



Patients were **switched to other GLP-1 RAs** during the shortage even though they had a valid prescription for Ozempic / Mounjaro.

Patients who were taking Ozempic / Mounjaro were asked / forced to take a **treatment break** and then restart the medication when the shortage issue was resolved.

New patients could not be initiated on Ozempic / Mounjaro and had to wait or were prescribed an alternative therapy.

Physicians were **restricted to prescribing** Ozempic / Mounjaro only to those adult T2D patients who were either already on Ozempic / Mounjaro or for whom other medicines were not suitable.

*The presented data are sourced from **Clarivate's T2D A&R report (U.S.)** which published in October 2023. Clarivate will also assess the supply-demand gap of GLP-1 RA products as a special topic in the upcoming obesity / overweight A&R report (U.S.), slated to publish in September 2024.

"Patients trying to find a pharmacy that has the medication they are looking for is not always possible, so they switch or lower the dosage. Some patients temporarily decided to go to an oral GLP-1 receptor agonist, if available." **–Endocrinologist, United States**

Clarivate's takeaways

How are physicians managing their T2D patients during the shortage?

Clarivate surveyed physicians stated that some of their patients had to visit multiple pharmacies to find Ozempic and/or Mounjaro for T2D. Our research indicates that many physicians opted to either switch their commercially insured T2D patients who were meant to start treatment with Ozempic or Mounjaro to a different GLP-1 RA product or postponed treatment until the supply of these drugs was restored in pharmacies.

How are the MCOs handling the off-label use of GLP-1 RA products?

Many surveyed PDs/MDs reported that their MCO intends to implement or strengthen utilization management controls to address the off-label use of Ozempic and Mounjaro. While some respondents cited education and outreach to both physicians and patients for Ozempic, others said they would consider formulary tiering or patient cost-share to manage the off-label use of Mounjaro.

Clarivate will publish a **Current Treatment: Physician Insights (US)** report on **GLP-1 and GIP / GLP-1 receptor agonists** in **July 2024**.

Type 2 diabetes

- [Disease Landscape & Forecast](#) | T2D (G7), providing comprehensive market intelligence insights.
- [Treatment Algorithms: Claims Data Analysis](#) | T2D (US), with details on the treatment journey and brand usage practices based on patient-level claims data.
- [Epidemiology](#), with diagnosed incidence and prevalence data for T2D; coverage includes G7 countries.
- [Current Treatment: Physician Insights](#) | T2D (US), exploring the current prescribing trends of physicians treating T2D.
- [Unmet Need](#) | T2D (US and EU), providing a detailed, expanded analysis of the unmet needs associated with oral T2D therapies, including an Excel-based Target Product Profile Simulator.
- [Access and Reimbursement](#) | T2D (US), providing insights on the impact of payer policies on prescribing behavior in T2D.
- [China In-Depth](#) | T2D

Obesity / overweight

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Shambhavi Shukla, M.Tech., is a Lead Healthcare Research & Data Analyst in the Cardiovascular, Metabolic, Renal, and Hematology. Ms. Shukla has authored competitive landscape and market insight reports on type 1 and type 2 diabetes, osteoporosis, and FSGS. She holds a master's degree in biotechnology from Amity University in India.

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